

Issue: Assigning a Task CMS

1. From the contract or claim level of CMS you can send a “Task.” If a claim has been started a task should be sent from the claim level of CMS.
 - a. Click on the [Actions] button on the right side of the page.
 - b. Click on [Tasks].**
 - c. Click into the [Subject] field and choose the subject you want to name the task.
 - d. Type in the name of the Adjuster, Team Lead, or Queue you are assigning the task to in the Assign To” field. Example: An adjuster may enter the Queue “Customer Service” if a follow up to the contract holder is needed
 - e. “Task Type” use the drop down and select the department you are sending the task too.
 - f. Task Reason” use drop down that best fits the reason you are assigning a task. If you select other, please note in the “Other Reason Details” box.
 - g. “Click” Due Date and set the date you desire. Almost all tasks should be for the same day the task is being sent.
 - h. In the “Comments” field include what action needs to be taken. (Example: contract holder statement, received records, new information, etc.)
2. Once you have your comments in the appropriate fields do not change the “Priority” or Status.”
 - a. Click on [Save].
 - b. Once your task is successfully saved, it will bring you to the next page to review your task you assigned.
 - c. When you return to the Claims Tab, all assigned task(s) will be visible under Activity.

Source: Assigning a Task CMS

Purpose

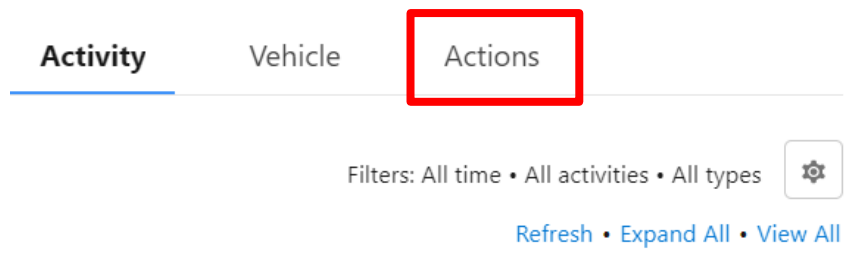
This SOP is intended to outline how to assign a task in Claims Management.

Teams Impacted

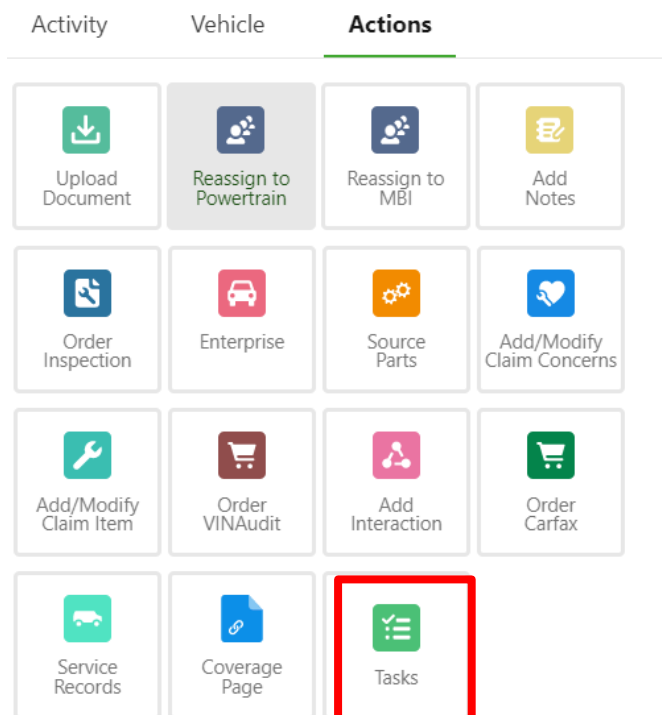
- Customer Service
- Claims

Procedure

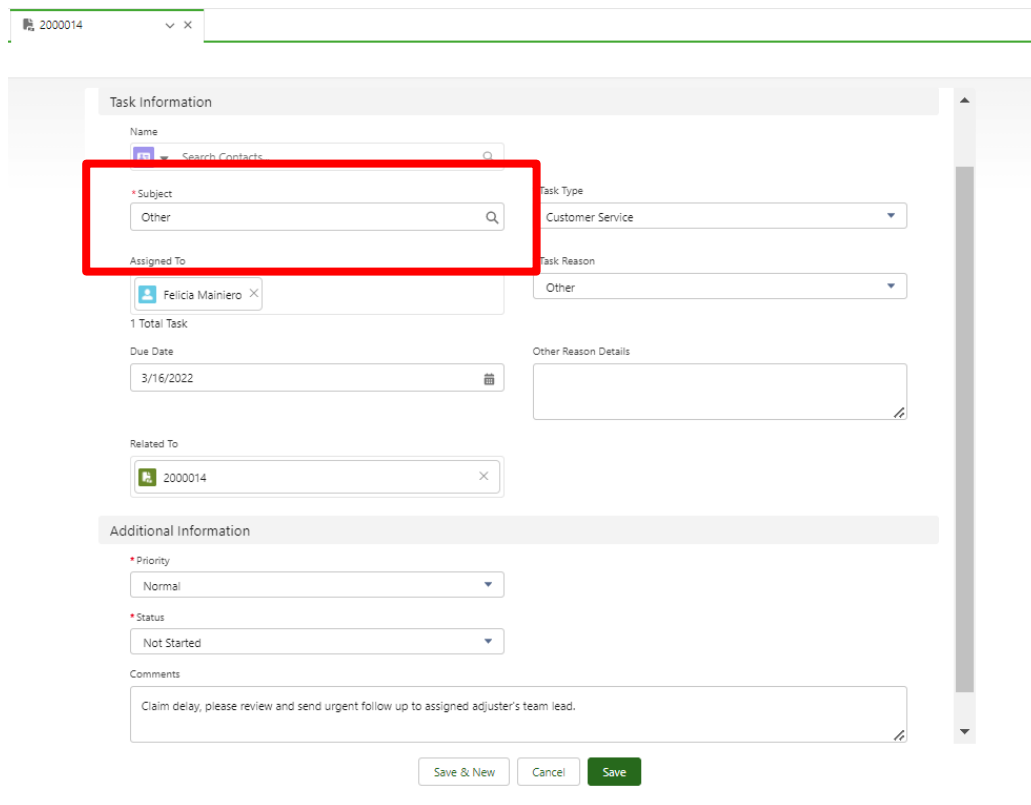
- From the contract or claim level of CMS you can send a "Task."
 - If a claim has been started a task should be sent from the claim level of CMS.
 - Click on the **[Actions]** button on the right side of the page.



- Click on **[Tasks]**.

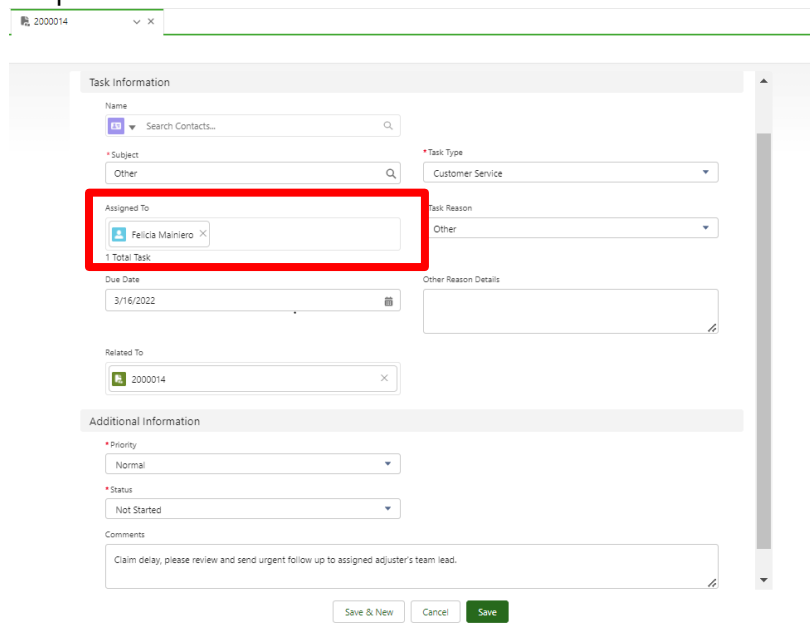


c. Click into the **[Subject]** field and choose the subject you want to name the task.



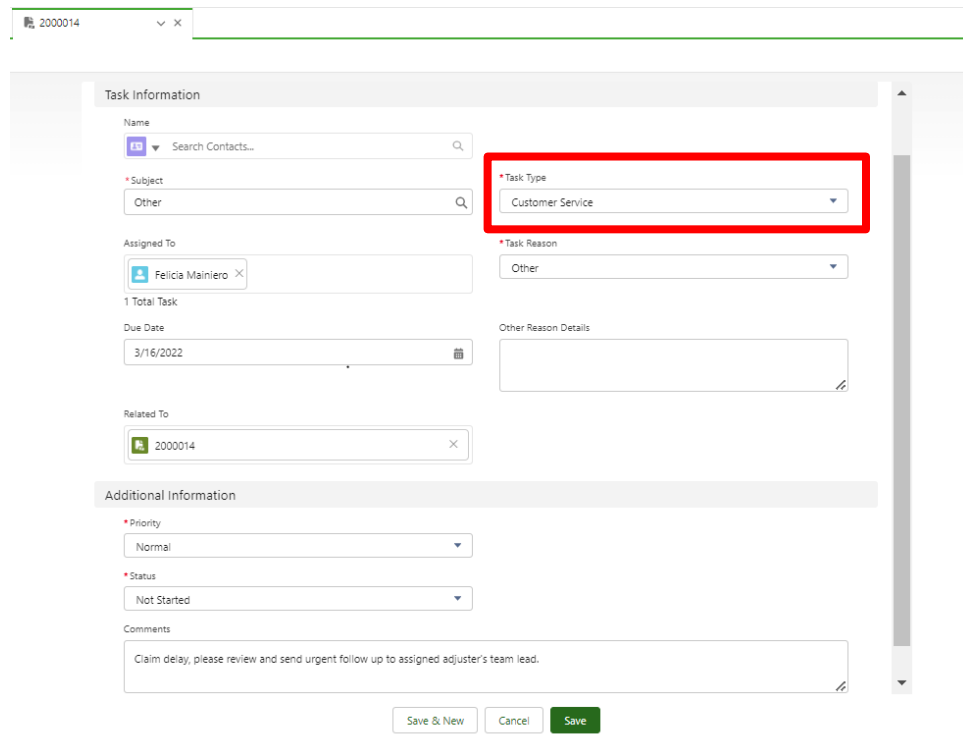
The screenshot shows the 'Task Information' form in the CMS. The 'Subject' field is highlighted with a red box and contains the text 'Other'. The 'Assigned To' field shows 'Felicia Mainiero'. The 'Task Type' is 'Customer Service' and the 'Task Reason' is 'Other'. The 'Due Date' is '3/16/2022'. The 'Related To' field shows '2000014'. The 'Additional Information' section includes 'Priority' (Normal), 'Status' (Not Started), and 'Comments' (Claim delay, please review and send urgent follow up to assigned adjuster's team lead.). The 'Save & New', 'Cancel', and 'Save' buttons are at the bottom.

d. Type in the name of the Adjuster, Team Lead, or Queue you are assigning the task to in the "Assign To" field. Example: An adjuster may enter the Queue "Customer Service" if a follow up to the contract holder is needed.



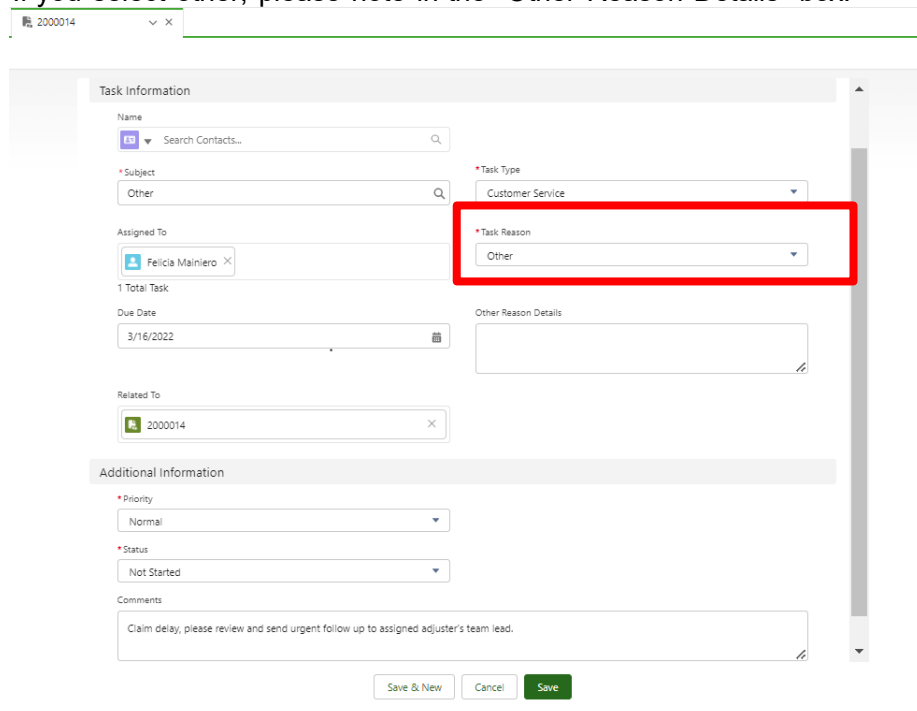
The screenshot shows the 'Task Information' form in the CMS. The 'Assigned To' field is highlighted with a red box and contains the text 'Felicia Mainiero'. The 'Subject' field is 'Other'. The 'Task Type' is 'Customer Service' and the 'Task Reason' is 'Other'. The 'Due Date' is '3/16/2022'. The 'Related To' field shows '2000014'. The 'Additional Information' section includes 'Priority' (Normal), 'Status' (Not Started), and 'Comments' (Claim delay, please review and send urgent follow up to assigned adjuster's team lead.). The 'Save & New', 'Cancel', and 'Save' buttons are at the bottom.

- a. "Task Type" use the drop down and select the department you are sending the task too.



The screenshot shows the 'Task Information' section of the CMS interface. The 'Task Type' dropdown menu is highlighted with a red box and is set to 'Customer Service'. Other fields include 'Subject' (Other), 'Assigned To' (Felicia Mainiero), 'Due Date' (3/16/2022), and 'Related To' (2000014). The 'Additional Information' section shows 'Priority' (Normal) and 'Status' (Not Started). The 'Comments' field contains the text: 'Claim delay, please review and send urgent follow up to assigned adjuster's team lead.' At the bottom are buttons for 'Save & New', 'Cancel', and 'Save'.

- b. "Task Reason" use drop down that best fits the reason you are assigning a task.
a. If you select other, please note in the "Other Reason Details" box.



The screenshot shows the 'Task Information' section of the CMS interface. The 'Task Reason' dropdown menu is highlighted with a red box and is set to 'Other'. The 'Task Type' is set to 'Customer Service'. Other fields include 'Subject' (Other), 'Assigned To' (Felicia Mainiero), 'Due Date' (3/16/2022), and 'Related To' (2000014). The 'Additional Information' section shows 'Priority' (Normal) and 'Status' (Not Started). The 'Comments' field contains the text: 'Claim delay, please review and send urgent follow up to assigned adjuster's team lead.' At the bottom are buttons for 'Save & New', 'Cancel', and 'Save'.

- c. “Click” **Due Date** and set the date you desire. Almost all tasks should be for the same day the task is being sent.

2000014

Task Information

Name

* Subject

Assigned To

Due Date

Related To

* Task Type

* Task Reason

Other Reason Details

Additional Information

* Priority

* Status

Comments

- d. In the “Comments” field include what action needs to be taken. (Example: contract holder statement, received records, new information, etc.)

2000014

Task Information

Name

* Subject

Assigned To

Due Date

Related To

* Task Type

* Task Reason

Other Reason Details

Additional Information

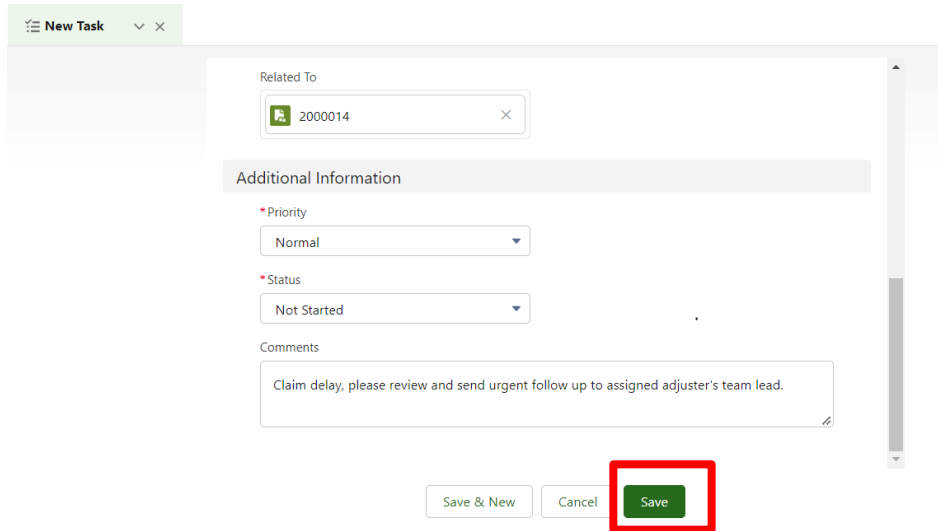
* Priority

* Status

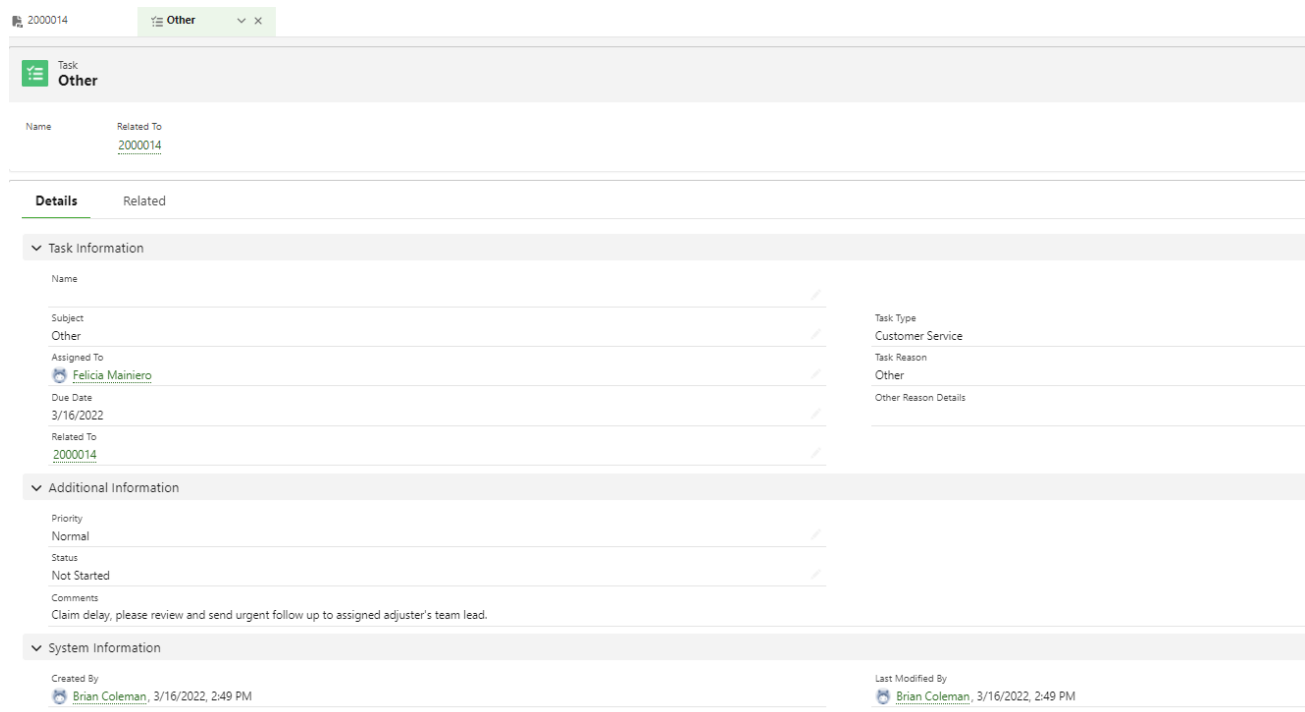
Comments

2. Once you have your comments in the appropriate fields do not change the "Priority" or "Status." Click on **[Save]**.

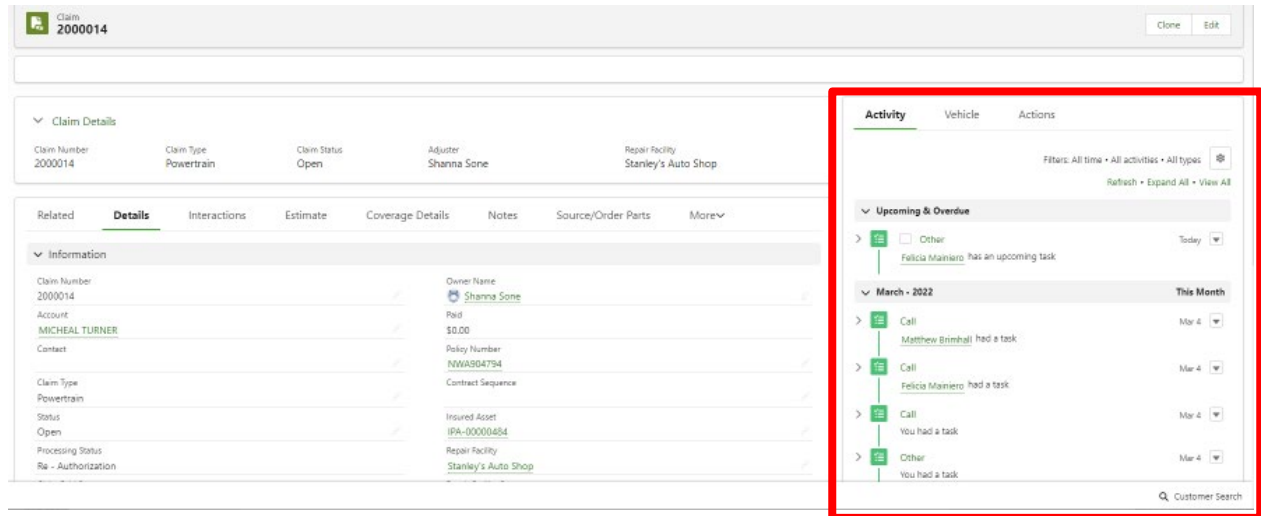
a.



- b. Once your task is successfully saved, it will bring you to the next page to review your task you assigned.



c. When you return to the Claims Tab, all assigned task(s) will be visible under Activity.



The screenshot displays the CMS interface for Claim 2000014. The 'Claim Details' section shows the claim number, type (Powertrain), status (Open), adjuster (Shanna Sone), and repair facility (Stanley's Auto Shop). The 'Activity' tab is highlighted with a red box, showing a list of tasks assigned to Felicia Mainiero. The tasks are categorized by date, with 'March - 2022' selected. The tasks listed are:

- Other: Felicia Mainiero has an upcoming task (Today)
- Call: Matthew Brimhall had a task (Mar 4)
- Call: Felicia Mainiero had a task (Mar 4)
- Call: You had a task (Mar 4)
- Other: You had a task (Mar 4)

Approval & Revision

Date Created 3/8/2022	Created By Felicia Mainiero		Date Approved 3/14/2022	Approved By Brian Coleman	
Date Revised 3/16/2022	Revised by Brian Coleman	Revision Description Updated "Task" processes and screen shots to match CMS updates	Date Approved [Date]	Approved By [Approver's Name]	
Date Revised [8/19/2022]	Revised by Brian Coleman	Revision Description Correct verbiage (Group to Queue, we don't use groups)	Date Approved [Date]	Approved By [Approver's Name]	
Date Revised 08/02/2023	Revised by Melissa Bryant	Revision Description Added Fast Track Articles	Date Approved 08/02/2023	Approved By Amanda Wiseman	
Date Revised [Date]	Revised by [Revisor Name]	Revision Description [Enter what has changed from the previous version]	Date Approved [Date]	Approved By [Approver's Name]	